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The Threat of Linux to Microsoft

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Winblad believes IBM has done an extraordinary job at establishing itself as a leader in software. IBM is proactive with acquiring early stage companies and partners well. Microsoft is successful because they view everything as a threat and don't take anything for granted, she says. Linux is still a force and will not easily go away because it is really hard to kill large companies in the software industry.

Transcript

Linux is another really interesting thing and the dynamic there was more IBM competing against Sun than Linux competing against Microsoft.. I think IBM has done an extraordinary job in reestablishing itself as a leading force in software.. In fact, IBM is the largest software company in the world.. It's had contiguous leaderships.. Steve Mills has led that software division for over a decade.. We don't operate in a Microsoft versus everybody else world.. It's a 3D chessboard out there.. There are a lot of big companies.. Any time the chessboard moves, Sun's movement on the chessboard has created some opportunities.. Again, I think Microsoft is a very successful company because they view everything is a threat..

They don't take anything for granted.. I think that DNA has reached deep inside of IBM as well.. IBM is extremely proactive with early stage companies and partnering very well with them.. In fact, the easiest companies right now for our portfolio companies to partner with are Microsoft and IBM above all the others.. They're willing to create solid ecosystems in their own environment.. So Linux is a real force but I really don't think any one of these things is not that simple it's going to whack companies away.. In fact it's really hard to kill large companies in the software industry.. Some stay around for a long time after being severely maimed.. I think Wordstar might still exist somewhere in Toledo...